

***SFA Modernization Partner***  
**United States Department of Education**  
**Student Financial Assistance**



**Customer Relationship Management**  
**Final Project Status Report**

***Task Order #11***  
***Deliverable #11.1.4***

**April 7, 2000**

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# **1 Introduction**

## **1.1 Purpose**

This deliverable is part of Task Order 11, and is the Final Project Status Report for the Ombudsman Case Tracking System Redesign project.

## **1.2 Scope**

This document covers the following areas:

- Project Summary
- Status Reports

## 2 Project Summary

This project was completed as of March 31, 2000 and all project milestones were completed in the timeframe expected. This accomplishment was due to the excellent teamwork and contributions of all members of the team. The following major tasks were completed:

- **Current system data analysis:** Information from the current Ombudsman Case Tracking System (OCTS) was extracted and matched to NSLDS loan data in order to prepare information needed to provide reports for the March 2000 reporting requirements. Details of the information provided has been provided in the Analysis Data Summary deliverable.
- **CRM Vendor Recommendation:** Several CRM vendors were screened prior to selecting Siebel, Oracle, and Clarify to analyze in detail. After several presentations and client visits the team was in agreement that Siebel best met the needs of the Ombudsman's office. A recommendation to this effect was documented in the CRM Vendor Recommendation Report deliverable.
- **CRM Implementation Plan:** A plan was developed for installation of Siebel, including the conversion from the current OCTS system. The plan was developed to allow conversion to the new system by June 30, 2000. This was documented in the CRM Implementation Plan deliverable.
- **Project Status Reports:** Project status reports were produced and distributed electronically on a biweekly basis to the team and interested parties.

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### **3 Project Status Reports**

The following status reports were distributed electronically to members of the team as the project progressed.